

# Consumer Expenditure Survey: Quarterly Data from the Interview Survey, First Quarter 1998



U.S. Department of Labor  
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Report 937

Average annualized expenditures rose 2.4 percent from the first quarter of 1997 to the first quarter of 1998. (See table A.) This was similar to the 2.3-percent quarter-to-quarter increase the previous year. Among the major expenditure components, spending on entertainment rose the most, almost 11 percent, in first quarter 1998 from the first quarter of 1997, followed by a 6.6-percent increase in spending on personal insurance and pensions. Spending on transportation and apparel decreased over the period, by 2.9 per-

cent and 1.7 percent, respectively. Among other components, spending rose moderately over the period: Health care, 4.6 percent; housing, 2.9 percent; food, 2.6 percent; and other expenditures, 3.2 percent. Table B shows average quarterly (annualized) expenditures for the first quarters of 1992 through 1998. Data on the average quarterly (annualized) expenditures for consumer units classified by income quintiles, age of the reference person, and region of residence appear in tables 1 through 3, respectively.

Table A. Annualized first quarter expenditures of all consumer units and percent changes, Consumer Expenditure Survey, 1996-98

Item	First quarter 1996	First quarter 1997	First quarter 1998	Percent change 1996-97	Percent change 1997-98
Number of consumer units (in thousands) .....	104,444	105,402	107,114		
Income before taxes <sup>1</sup> .....	\$37,277	\$39,183	\$41,168		
Average age of reference person .....	47.8	47.5	47.8		
Average number in consumer unit:					
Persons .....	2.5	2.5	2.5		
Earners .....	1.3	1.3	1.3		
Vehicles <sup>2</sup> .....	1.9	1.9	1.9		
Total expenditures .....	\$30,868	\$31,569	\$32,331	2.3	2.4
Food .....	4,669	4,706	4,827	.8	2.6
Housing .....	9,761	10,113	10,405	3.6	2.9
Apparel and services .....	992	1,030	1,012	3.8	-1.7
Transportation .....	6,157	6,135	5,958	-.4	-2.9
Health care .....	1,634	1,690	1,767	3.4	4.6
Entertainment .....	1,423	1,388	1,536	-2.5	10.7
Personal insurance and pensions .....	2,987	3,184	3,395	6.6	6.6
Other expenditures .....	3,244	3,324	3,432	2.5	3.2

<sup>1</sup> Income values are derived from "complete reporters" only; see Brief definitions.

<sup>2</sup> As of 1997 leased vehicles are included in Vehicles.

Table B. Selected average quarterly annualized expenditures<sup>1</sup> of consumer units, Interview survey, first quarters, 1992-98

Item	1992	1993	1994	1995	1996	1997	1998
Total expenditures .....	\$27,245	\$27,379	\$28,590	\$29,142	\$30,868	\$31,569	\$32,331
Food .....	4,288	4,278	4,443	4,441	4,669	4,706	4,827
At home .....	3,213	3,171	3,262	3,293	3,431	3,459	3,524
Away from home .....	1,074	1,107	1,180	1,148	1,238	1,246	1,302
Housing .....	8,738	8,691	9,008	9,293	9,761	10,113	10,405
Shelter .....	5,299	5,236	5,293	5,635	5,804	5,992	6,343
Owned dwellings .....	3,292	3,222	3,207	3,536	3,598	3,693	3,954
Rented dwellings .....	1,711	1,715	1,752	1,798	1,863	1,935	2,008
Other lodging .....	297	299	334	332	372	384	382
Utilities, fuels, and public services .....	2,130	2,237	2,415	2,305	2,514	2,579	2,508
Household furnishings and operations .....	1,309	1,219	1,298	1,353	1,443	1,543	1,554
Apparel and services .....	976	937	1,016	938	992	1,030	1,012
Transportation .....	4,773	4,753	5,287	5,385	6,157	6,135	5,958
Vehicle purchases .....	1,907	1,861	2,333	2,238	2,793	2,680	2,483
Gasoline and motor oil .....	908	953	923	996	1,042	1,045	991
Other transportation expenses .....	1,857	1,834	2,031	2,162	2,322	2,430	2,484
Health care .....	1,512	1,721	1,713	1,644	1,634	1,680	1,767
Entertainment .....	1,222	1,225	1,275	1,350	1,423	1,398	1,536
All other expenses <sup>2</sup> .....	5,735	5,774	5,850	6,110	6,231	6,508	6,827

See footnotes at end of tables.

Table 1. Quintiles of income before taxes: Average quarterly expenditures<sup>1</sup> of all consumer units, interview survey, first quarter, 1988

Item	All consumer units	Complete reporting of income						Incomplete reporting of income
		Total complete reporting	Lowest complete reporting	Second 20 percent	Third 20 percent	Fourth 20 percent	Highest 20 percent	
Number of consumer units (in thousands) .....	107,114	85,817	17,119	17,190	17,160	17,150	17,197	21,297
Number of sample units .....	5,545	4,461	876	886	891	886	912	1,084
Consumer unit characteristics:								
Income before taxes <sup>1</sup> .....	\$41,168	\$41,168	\$7,222	\$17,726	\$30,781	\$49,699	\$100,247	(3)
Age of reference person .....	47.8	47.7	51.3	52.2	45.4	44.0	45.7	48.2
Number in consumer unit .....								
Persons .....	2.5	2.5	1.7	2.2	2.5	2.9	3.1	2.6
Children under 18 .....	.7	.7	.4	.5	.7	.8	.9	.7
Persons 65 and over .....	.3	.3	.4	.5	.3	.1	.1	.3
Earners .....	1.3	1.3	.6	.9	1.3	1.8	2.1	1.3
Vehicles .....	1.9	2.0	1.0	1.5	2.0	2.5	2.9	1.8
Total expenditures .....	\$32,331	\$33,219	\$14,824	\$21,731	\$28,409	\$39,107	\$61,943	\$28,751
Food .....	4,827	4,771	2,873	3,678	4,494	5,512	7,288	5,052
Housing .....	10,405	10,494	5,448	7,218	9,347	11,551	18,884	10,045
Shelter .....	6,343	6,409	3,321	4,380	5,554	6,979	11,797	6,077
Owned dwellings .....	3,954	3,996	1,203	1,828	2,780	4,754	9,402	3,783
Rented dwellings .....	2,008	2,018	1,981	2,348	2,568	1,885	1,308	1,988
Other lodging .....	382	395	138	204	206	340	1,088	326
Utilities, fuels, and public services .....	2,508	2,484	1,573	2,074	2,454	2,821	3,493	2,603
Housefurnishings and operations .....	1,554	1,602	553	765	1,339	1,751	3,594	1,365
Apparel and services .....	1,012	1,031	514	653	883	1,142	1,961	933
Transportation .....	5,958	5,913	1,964	4,218	5,252	7,804	10,314	6,136
Gasoline and motor oil .....	991	996	451	723	956	1,310	1,536	971
Other transportation expenses .....	4,966	4,917	1,511	3,495	4,296	6,494	8,777	5,165
Health care .....	1,767	1,808	1,169	1,816	1,585	1,820	2,647	1,603
Entertainment .....	1,536	1,531	834	771	1,165	1,821	3,057	1,557
All other expenses <sup>2</sup> .....	6,827	7,672	2,022	3,377	5,684	9,457	17,792	3,425

See footnotes at end of tables.

Table 2. Age of reference person: Average quarterly expenditures<sup>1</sup> of all consumer units, interview survey, first quarter, 1988

Item	All consumer units	Under 25	25-44	45-64	65 and over
Number of consumer units (in thousands) .....	107,114	7,848	44,505	32,605	22,156
Number of sample units .....	5,545	430	2,239	1,709	1,168
Consumer unit characteristics:					
Income before taxes <sup>1</sup> .....	\$41,168	\$16,089	\$45,876	\$53,000	\$24,172
Age of reference person .....	47.8	21.4	35.1	53.1	74.8
Number in consumer unit .....					
Persons .....	2.5	1.8	3.0	2.5	1.7
Children under 18 .....	.7	.4	1.2	.5	.1
Persons 65 and over .....	.3	(4)	(4)	(4)	1.3
Earners .....	1.3	1.1	1.8	1.6	.4
Vehicles .....	1.9	1.0	2.0	2.4	1.5
Total expenditures .....	\$32,331	\$18,691	\$35,596	\$37,495	\$23,004
Food .....	4,827	3,024	5,149	5,534	3,777
Housing .....	10,405	5,795	11,947	11,423	7,444
Shelter .....	6,343	3,989	7,486	6,948	4,038
Owned dwellings .....	3,954	420	4,485	4,345	2,880
Rented dwellings .....	2,008	3,205	2,705	1,422	1,048
Other lodging .....	382	344	277	581	312
Utilities, fuels, and public services .....	2,508	1,175	2,593	2,868	2,277
Housefurnishings and operations .....	1,554	650	1,887	1,607	1,129
Apparel and services .....	1,012	809	1,124	1,158	645
Transportation .....	5,958	3,543	6,955	6,753	3,840
Gasoline and motor oil .....	991	613	1,088	1,194	610
Other transportation expenses .....	4,966	2,925	5,857	5,559	3,029
Health care .....	1,767	415	1,377	1,947	2,788
Entertainment .....	1,536	812	1,771	1,688	1,097
All other expenses <sup>1</sup> .....	6,827	4,293	7,275	8,988	3,635

See footnotes at end of tables.

Table 3. Region of residence: Average quarterly expenditures<sup>1</sup> of all consumer units, interview survey, first quarter, 1988

Item	All consumer units	Northeast	Midwest	South	West
Number of consumer units (in thousands) .....	107,114	21,143	25,510	37,231	23,230
Number of sample units .....	5,545	1,012	1,373	1,799	1,362
Consumer unit characteristics:					
Income before taxes <sup>2</sup> .....	\$41,168	\$44,065	\$39,586	\$37,804	\$45,208
Age of reference person .....	47.8	48.3	48.3	48.1	48.4
Number in consumer unit .....					
Persons .....	2.5	2.4	2.4	2.5	2.6
Children under 18 .....	.7	.8	.7	.7	.8
Persons 65 and over .....	.3	.3	.3	.3	.3
Earners .....	1.3	1.3	1.4	1.3	1.4
Vehicles .....	1.9	1.7	2.1	1.9	2.1
Total expenditures .....	\$32,331	\$34,421	\$31,224	\$29,645	\$35,949
Food .....	4,827	4,999	4,850	4,632	5,175
Housing .....	10,405	11,799	9,461	9,095	12,272
Shelter .....	6,343	7,593	5,499	5,163	8,024
Owned dwellings .....	3,954	4,722	3,584	3,214	4,868
Rented dwellings .....	2,008	2,295	1,541	1,688	2,775
Other lodging .....	382	576	395	263	381
Utilities, fuels, and public services .....	2,508	2,703	2,541	2,511	2,287
Household furnishings and operations .....	1,554	1,503	1,422	1,421	1,980
Apparel and services .....	1,012	1,106	951	989	1,082
Transportation .....	5,958	5,768	6,157	5,902	6,002
Gasoline and motor oil .....	991	884	1,003	1,015	1,037
Other transportation expenses .....	4,966	4,884	5,153	4,886	4,965
Health care .....	1,767	1,618	1,783	1,867	1,693
Entertainment .....	1,536	1,660	1,589	1,276	1,782
All other expenses <sup>3</sup> .....	6,827	7,472	6,634	5,884	7,964

<sup>1</sup> These expenditure estimates for a particular quarter are presented at annual rates. (Values are multiplied by 4.)

<sup>2</sup> Includes alcoholic beverages, reading, education, tobacco, miscellaneous expenditures, personal care, cash contributions, personal insurance,

and pensions.

<sup>3</sup> Income values are derived from "complete reporters" only; see "brief definitions."

<sup>4</sup> Value less than 0.05

## Technical Notes

Data in this report are from the Interview portion of the Consumer Expenditure Survey, conducted by the Bureau of the Census for the Bureau of Labor Statistics. This survey consists of two components: (1) a Diary or recordkeeping survey completed by respondents for two consecutive 1-week periods, and (2) an Interview survey in which the expenditures of consumer units are obtained in five interviews conducted every 3 months. Data are collected in independent samples of consumer units that are representative of the U.S. population. The Interview sample, selected on a rotating panel basis, consists of approximately 5,000 consumer units each quarter.

The Interview survey data, which covers approximately 95 percent of all expenditures, include large expenditures, such as property, automobiles, and major appliances, as well as expenditures that occur on a regular basis, such as rent, utility payments, or insurance premiums.

There are limitations to these data that should be mentioned. First, for some analytical uses, the data should be seasonally adjusted. In the absence of computed seasonal adjustment factors, one may make comparisons with the same quarter of the previous (or earlier) year. Second, for infrequently purchased items, there are fewer reports in a

quarter than there are for a year. In order to obtain statistically reliable estimates, a sufficient level of reporting is required. Therefore, the tables based on quarterly data show less detail than those based on annual data. In addition, quarterly data tend to be more volatile than annual data.

### Brief definitions

**Consumer unit.** (1) All members of a particular household who are related by blood, marriage, adoption, or other legal arrangements; (2) a person living alone or sharing a household with others or living as a roomer in a private home or lodging house or in permanent living quarters in a hotel or motel, but who is financially independent; or (3) two or more persons living together who share responsibility for at least 2 out of 3 major types of expenses—food, housing, and all other expenses. (The terms "household" or "consumer" may also be used.)

**Complete income reporters.** In general, a complete income reporter is a respondent who provided values for at least one of the major sources of income, such as wages and salaries, self-employment income, and Social Security income. (A complete income reporter may or may not provide a full accounting of all income from all sources.)

*Total expenditures.* These are the transaction costs, (including excise and sales taxes), of goods and services acquired during the interview period. Averages include expenditures for gifts and contributions and payments for pensions and personal insurance.

*Quintiles of income before taxes.* Complete income reporters are ranked in ascending order, according to the level of total before tax income reported by the consumer unit. The ranking is then divided into five equal groups. Incomplete

income reporters are not ranked and are shown separately.

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